

ENSURING THE FINANCIAL FUTURE OF YOUR MENTORING PROGRAM



MENTOR
CONSULTING GROUP

Iowa Department of Public Health Mentoring Program Sustainability

Webinar Series

May 5 and May 11, 2016

Presenter:

**Dr. Susan G. Weinberger, President
Mentor Consulting Group**

DrMentor@aol.com

**MentorConsultingGroup.com
(203) 846-9608**

Guest Presenter:

**Craig Bowman, President
Common Ground Consulting, LLC.
craig@commongroundconsulting.org
(202) 744-2567**

MENTOR
CONSULTING GROUP

Lead Presenter

Dr. Susan G. Weinberger



MENTOR
CONSULTING GROUP

Dr. Susan G. Weinberger

- Dr. Susan G. Weinberger is the founder and President of the Mentor Consulting Group in Norwalk, CT. She was a pioneer in the creation of school-based mentoring in America in the early 1980s. Today she consults to school-based, site-based, after school, Native American, YouthBuild USA's AmeriCorps Mentoring Program and corporate mentoring programs internationally as well as to five federal agencies. Her focus is the design, implementation and evaluation of quality mentoring programs adhering to the Elements of Effective Practice. Susan believes that to ensure sustainability of mentoring programs, staff must engage in comprehensive and effective fundraising.
- Susan's numerous publications include: ***My Mentor & Me series*** for elementary, middle and high school; ***Preparing my Mentor for Me; Program Funding*** (Handbook of Youth Mentoring); ***Direct Corporate Support in Sustainability Planning and Resource Development for Youth Mentoring.***
- Dr. Weinberger, affectionately known as Dr. Mentor received President William Clinton's coveted Volunteer Action Award at the White House for her mentoring efforts. She also received the William A. O'Neill Legacy Award from CT Governor Dannel P. Malloy for a lifetime of tireless efforts and advocacy for expanding mentoring to youth. Among her greatest joys is mentoring a young woman since age 7 that is now 29 years old.

Webinar Series

Part I - Agenda

- Developing your fundraising plan
- Involving your Board of Directors
- Examining key sources of funding
- What comes first: Mentors or \$\$\$?
- Individual and Annual giving
- Government funding

Webinar Series

Part II - Agenda

- Corporate and Foundation giving and Engagement – 10 steps
- Matching gifts
- Planned giving
- Program events
- Direct Marketing
- Local Initiatives

Mentor Coordinators Job Description

- Create long range and marketing plans.
- Recruit, screen and train mentors and mentees.
- Match the pairs and monitor the relationship.
- Keep accurate data reporting and tracking.
- Evaluate the program and celebrate success.
- Create long term marketing plans.

**How can I do all that is required of me
in my busy job and FUNDRAISE, too?**



MENTOR
CONSULTING GROUP

Fundraising

- If more than 30% of your budget comes from only one source, you are already in a crisis mode.
- We must get comfortable with the “f” word: FUNDRAISING.
- Key to fundraising is to DIVERSIFY and work at it 365 days a year.
- *Number 1 reason people donate to charity – because they are asked. Don't be afraid to ask.....*

Why Diversify?

- Only one source could dry up.
- Don't wait for the crisis.
- Building a stable, diversified base will give you "breathing room."
- Prospective donors and funders will be impressed. They will only invest when they know you are financially stable.

Interesting Factoid

- How important is each of the following reasons to contribute to a charitable organization?

72.1% Someone I know well asked.

60.7% Have volunteered at the organization.

59.1% Asked by the clergy.

43.3% Read or heard a news story.

38.2% Asked at work

*Door-to-door solicitations and
Phonathons? Where are they in the mix?*



YOUR PRIVATE SECTOR PARTNERS

- **Who are your current private sources of funding?**
- **Successes in engaging them.**
- **Issues and challenges.**

Challenges for Mentoring Programs

- Government funding cutbacks but good news...NMRC portal – FREE TA & Training
- Shortfalls in traditional grant sources.
- Competition with other programs.
- Small staff with limited time beyond program operations.

Engaging the Private Sector Program Components in place

- **By-laws and 501(c)(3) status**
- **Clearly written mission statement.**
- **Compelling and well defined goals and objectives.**
- **Long range plan for long haul.**
- **Statement of critical need.**
- **Detailed budget.**

Engaging the Private Sector Program Components in place

- **Financial statement of growth outcomes.**
- **Data collection procedures.**
- **Demonstrated fiscal responsibility and accounting system.**
- **Track record of successful outcomes..
*"how do we know it is working?"***

Program Components in Place

- Current funding from multiple and diverse sources.
- Passionate and qualified manager.
- Trusted by the community.
- Responsive to changing needs.
- Strong, active, experienced, enthusiastic and effective board of directors.

Internal Planning: Board of Directors/Advisory Council

Board for Directors

- 1. Fiduciary responsibility for the agency
- 2. Fundraising
- 3. Governance - hires and fires Executive Director

Advisory Council

- 1. Helps with fundraising and marketing
- 2. Opens doors and rolodex to recruit mentors
- 3. Offers internships, part time employment and expertise for students

Preparing to Engage: Advisory Council

- Formation or expansion of a strong Advisory Council.
- Do you have an AC now? Who sits on it?



MENTOR
CONSULTING GROUP

Elements of Effective Practice

- **Advisory Council or Committee:**
 - Provides input and leadership to the program.
 - Provides a voice to constituents and stakeholders as the program evolves over time.
 - Ensures youth, volunteers, and others have a say in how services are delivered and that the program gets the support it needs to recruit volunteers, provide meaningful match activities, and effectively engages the community.

Clear Roles and Responsibilities

Select only the right volunteers to serve.

- 1. Consider *current* volunteers for the Council.
- 2. Select significant donors.
- 3. Look for natural leaders.
- 4. Diversify your Council and invite those who believe in your mission, your students and mentoring.
- Meet on a regularly scheduled basis.
- State serving is an honor and a privilege.

Advisory Council - Three "t's"

Time, Talent and Treasure

Business Leader

Financier-Accountant

Educator

Philanthropist

Public Relations

Marketing

Tax Advisor

Physician

Community Organizer

Fundraiser

Politician

Grant Writer

Media

Faith Community

Attorney (only one!)

Foundation Representative

How Effective is your Council?

All members must be willing to:

- 1. Roll up their sleeves.
- 2. Work on a fundraising campaign.
- 3. Make the right contacts & ask for \$.
- 4. Open their Rolodex.
- 5. Give annually to the mentoring program themselves.

Best Time to Develop a Plan

- **Not when funding is drying up.**
- **Not when program is in final year of a grant.**
- **Not a solution to a crisis, but rather a comprehensive effort over 365 days a year.**

Develop Your Plan

- **Develop clear picture of current sources of funding.**
- **Determine who takes the lead.**
- **Examine with Board/Council what funding sources you will target and timeline.**
- **Develop the plan and monitor it regularly.**
- **Allocate resources including time to support the plan.**
- **Assemble the best planning team.**
- **Review your program's vision and goals.**

Checklist for Practitioners: Planning Phase of Funding a Mentoring Program

- Does your agency have 501(c)(3) tax-exempt status?
- If a school-based program, convince the school district that their tax exempt status is not enough to fundraise.
- What are the state requirements regarding soliciting funds?
- Does your mentoring program have a written mission statement, bylaws, record-keeping and accounting systems?
- Is your Board of Directors in place?
- Do you have defined goals, objectives, successful outcomes, and a strong statement of health?
- Do you receive funding from many sources rather than just one?
- Do you have any Board members without term limits?
- Do 100% of your Board give yearly to the program?
- Do you have a team of volunteers who have the time, interest, and expertise to assist you in fundraising efforts?

Six sources of Funding

- **1. Government**
- **2. Private Foundations**
- **3. Special or 3rd party events**
- **4. Individuals/Annual appeal**
- **5. Tax Credits, In-kind**
- **6. *Corporate Giving***

Additional Sources of Funding

- **Planned Giving**
- **Program Events and Direct Marketing**
- **Direct Mail**
- **Fee for model replication**
- **United Way – designated donations**

Observation

- What comes first?
- Mentors or Money.....

Craig A. Bowman



MENTOR
CONSULTING GROUP

Craig A. Bowman

Guest Presenter

- Craig A. Bowman is the President of Common Ground Consulting, LLC™ located in Washington, D.C. For the past twenty five years, he has been providing consulting services for community based, national, and international nonprofit/NGO (social profit) organizations. As a leading social sector futurist, he has spent his career developing a philosophy of leadership that harnesses passion and trust as a bridge between human potential and social responsibility.
- Bowman's client portfolio includes more than 200 organizations, 25 foundations and consulting firms, 17 government departments and agencies, and students, faculty, and administrators from more than 225 colleges and universities in the United States and abroad. He has worked in 31 countries on five continents. Craig has worked extensively with federal agencies and community programs around mentoring and fundraising including
- Craig was a part of the team that helped to create, launch and support AmeriCorps.
- Craig believes in the power of individuals, especially young people, to impact their communities in positive and productive ways; and has committed his life to working with vulnerable populations through cross-cultural exchange, mentoring, community and youth development, movement strategy and social justice.

www.commongroundconsulting.org

The screenshot shows the homepage of Common Ground Consulting. The header includes the logo and navigation links: HOME, ABOUT, SERVICES, NEWS & EVENTS, CONTACT US, and DONATE. The main banner features a collage of hands reaching up, with the words 'look', 'listen', 'feel', 'act', and 'connect' overlaid. Below the banner, there are several sections: 'BECOME A MEMBER', 'WHY CHOOSE US?', 'NEW SERVICES IN 2013!', 'ABOUT OUR FOUNDATION', 'LEADERSHIP COACHING', 'INTERACTIVE', 'RECORD ENGAGEMENTS', 'CORPORATE FOR NATIONAL AND COMMUNITY SERVICES', 'RECORD CENTER', and 'EVENTS OFFERS'. The footer contains contact information and a copyright notice.

Common Ground Consulting LLC

passion

look listen feel act connect

BECOME A MEMBER

WHY CHOOSE US?

NEW SERVICES IN 2013! Click "connect" above or "leadership coaching" below.

ABOUT OUR FOUNDATION

LEADERSHIP COACHING

INTERACTIVE

RECORD ENGAGEMENTS

CORPORATE FOR NATIONAL AND COMMUNITY SERVICES

RECORD CENTER

EVENTS OFFERS

CONTACT US

HOME | ABOUT | SERVICES | NEWS & EVENTS | CONTACT US | DONATE

Copyright © 2013. All rights reserved. Common Ground Consulting LLC. All rights reserved. 1000 First Street, NE, Washington, DC 20002. Tel: 202.744.2967. Fax: 202.233.8888. info@commongroundconsulting.org



FUNDRAISING

Creating opportunities for people to direct the resources they have in their life in abundance ...

TIME, TALENT & TREASURE

**towards the issues and concerns
that matter to them the most.**

The background of the slide features a stylized graphic of several hands in various shades of blue, reaching out from the left side towards the center. The hands are rendered in a soft, painterly style with visible brushstrokes.

**Fundraising is
About Raising
Money in a Way
That inspires Trust**

Fundraising & Development



Developing a Positive Fundraising Mindset

Raising money—**especially money from actual people**—involves two key elements.

The more important of these elements is the **HEART** (yours and theirs), which speaks to the passion, caring, and commitment that people bring when stepping up to get involved with issues and concerns they care about.

The second element, the **HEAD**, requires a commitment to creating the right system for managing your resource development program.

Fundraising & Development

Fundraising Is Your Mission in Action

- ★ **Change your paradigm.** When you approach fundraising with passion, joy, and excitement, you will always be successful.
- ★ **Follow the money!** Fundraising is a money business that supports sacred work. *Help your family and friends to uncover their own passions, hopes, and dreams and make a difference in the world through their powerful generosity.*
- ★ **There is enough money.** With \$87 trillion floating around the planet right now, there is more than enough to support all of our critical, life-changing work.
- ★ **Its not about knowing rich people.** Women and poor people give the highest percentage of their income to causes they care about.
- ★ **Donors are investors.** Focus on building strong relationships that are based on integrity and which honor the donor's desire to make a difference in the world. Its your job to ask, their job to decide.
- ★ **Believe.** Your belief in the power of your organization's mission, vision, and values must exceed your fear of asking for people's time, talent, and treasure.

**Donors don't give to institutions.
They invest in ideas and people in whom they believe.**

— G.T. Smith

**In good times and bad, we know that people give because you
meet needs, not because you have needs.**

— Kay Grace

THE ABILITY TO RAISE \$\$...

**BEGINS WITH KNOWING YOURSELF
& KNOWING WHERE THE MONEY IS!**

U.S. Giving: 2014

\$358 Billion!

2.1% of GDP

7.1% Increase Over 2013

1.5 Million Social Profit Orgs

U.S. Giving: 2014

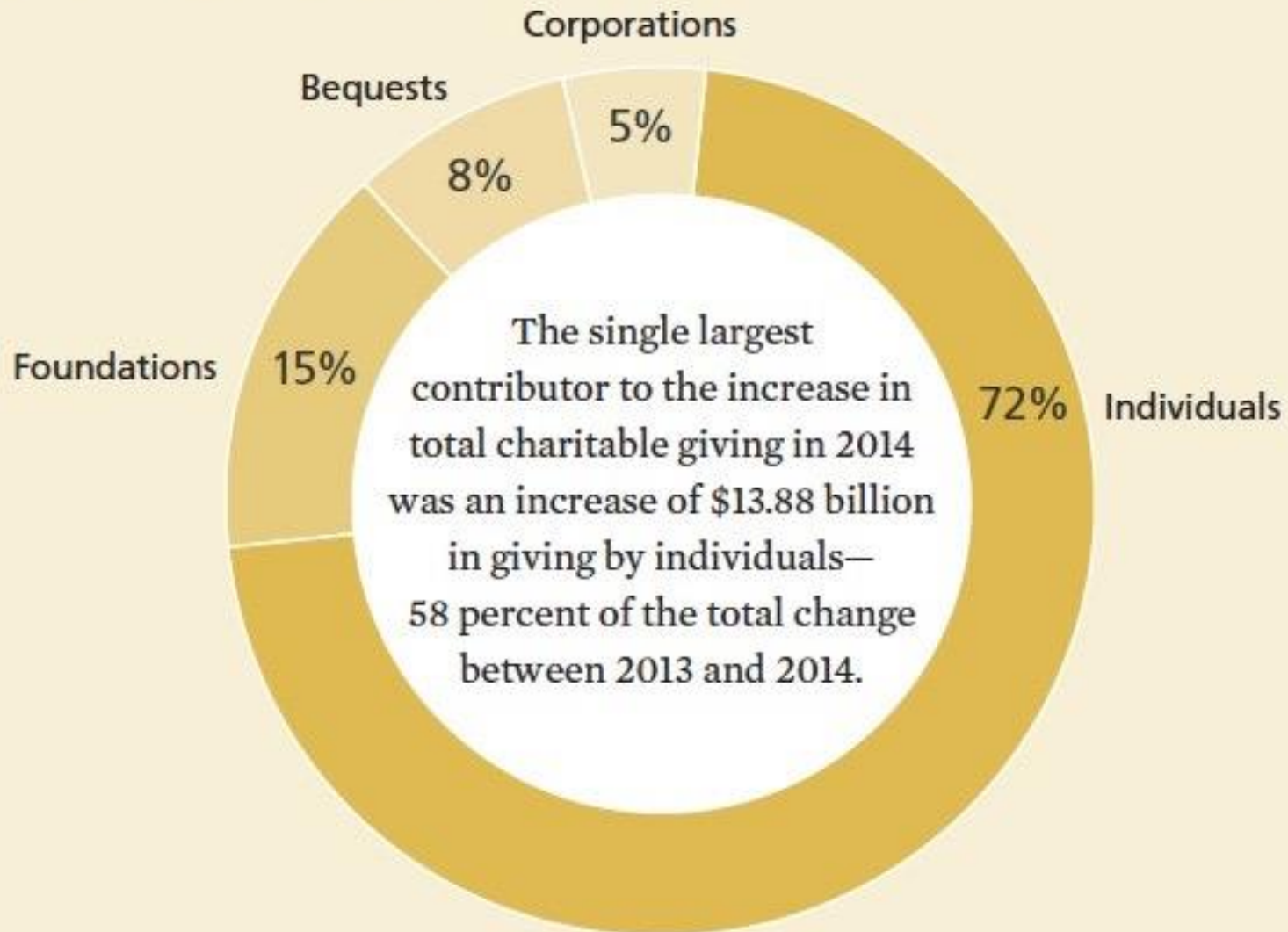
Per Capita Giving: \$1,050

Average Household Giving: \$2,030

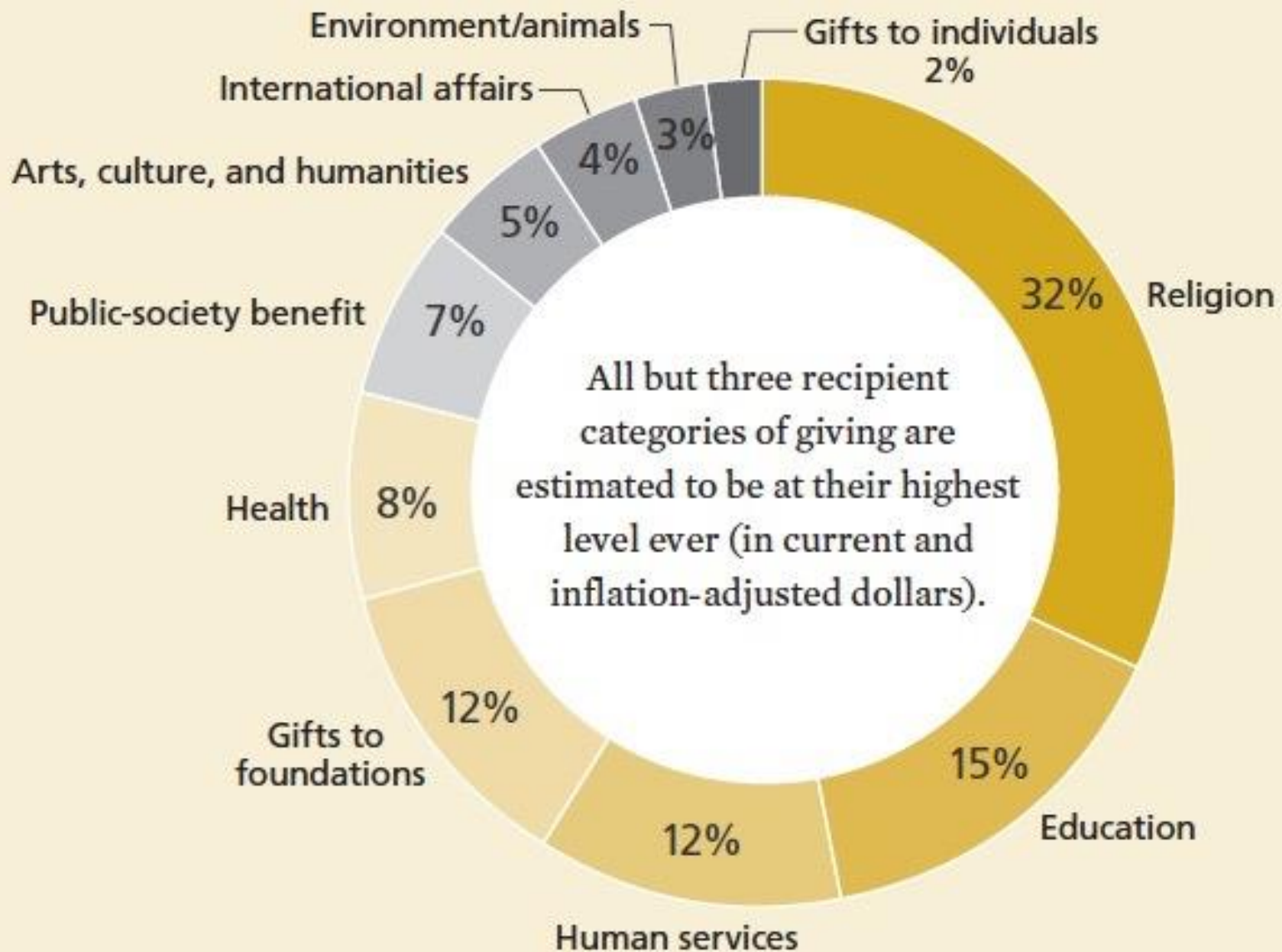
1.5 Million Social Profit Orgs

Total 2014 contributions: \$358.38 billion

Contributions by source (by percentage of the total)



Contributions by recipient category (by percentage of the total)



+7.1%

**Total estimated U.S.
charitable giving**
increased by 7.1 percent,
to \$358.38 billion, in 2014.

+5.7%

Giving by individuals
is estimated to have
increased by 5.7 percent.

+8.2%

Giving by foundations
increased by an estimated
8.2 percent.

+15.5%

Giving by bequest
is estimated to have
increased by 15.5 percent.

+13.7%

Giving by corporations
increased by an estimated
13.7 percent.

**You're frustrated
because you keep
waiting for the blooming
of flowers for which you
have yet to sow the
seeds.**

— Steve Maraboli

The 6 Steps to Asking

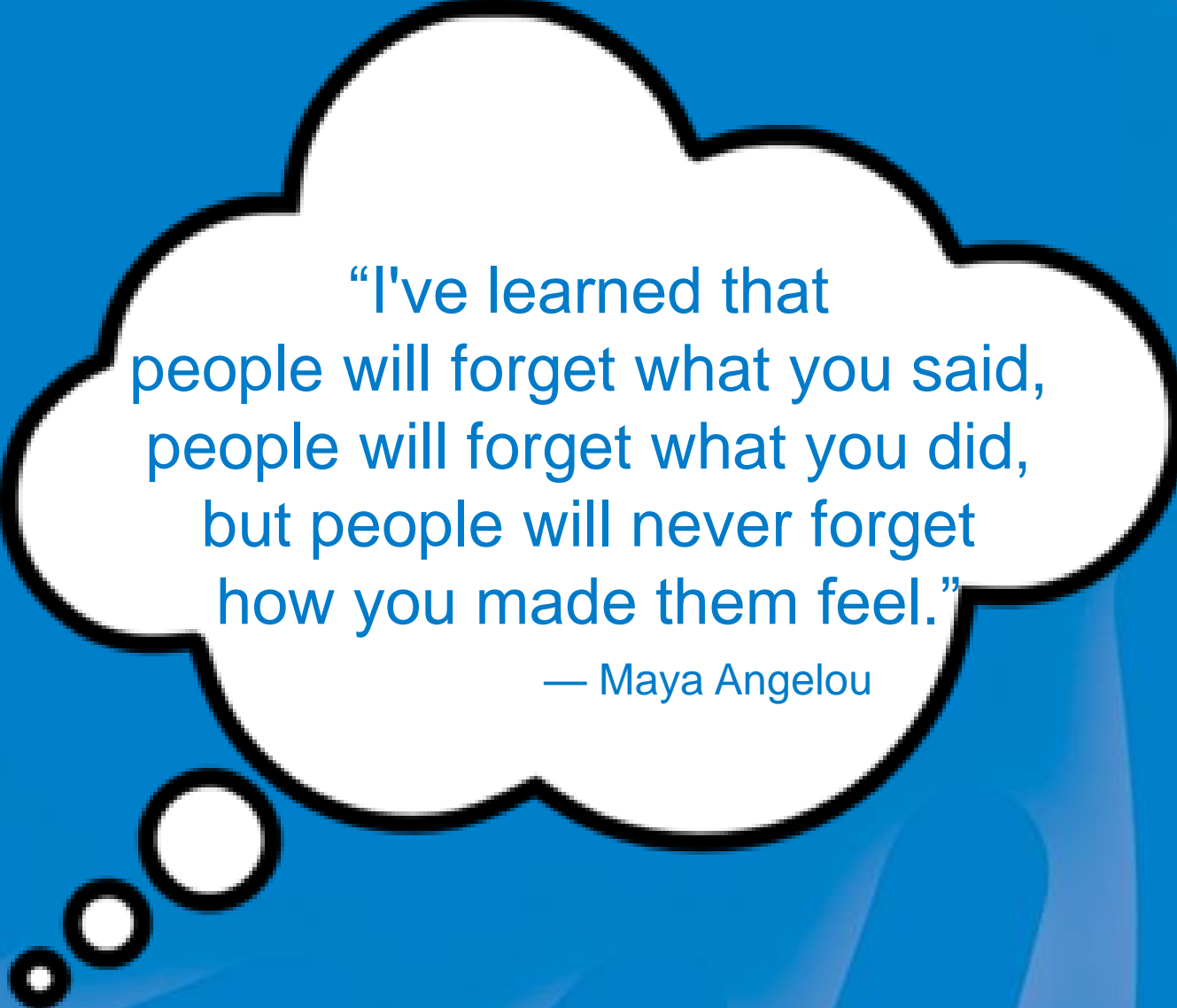
1. Who are you? How are you connected to the organization? Why are you here?
2. What does your organization do? What is the mission and vision? What are the organization's values? What is its history?
3. What is your organizational story? Why would a donor care? How does your organization's work connect to what the prospect cares about—what they are passionate about?
4. What is the GAP? What amazing work are you doing now? What else could you do if this donor invested time, talent, or treasure?
5. What specifically are you asking this donor to invest? Do you know what you want? Have you done your homework? Do you see the the right amount flashing on their forehead?
6. What will the donor receive for their investment? Are you offering recognition? Have you imagined how you will thank them for their generosity? How will the organization express its gratitude?

A Few More Things About Asking

- It is your job to boldly ask. It is the prospective donor's job to decide yes or no. Ask and then be quiet. Listen. Answer their questions. Thank them genuinely regardless of their answer.
- You will not define your success by the number of people who say yes and give, but rather by the number of people who say no!
- *You will not avoid asking your friends and family; and you will contribute first.*
- You will not be afraid to ask people for what your organization needs; and you will always ask for a little more than makes you comfortable.
- Whenever you are asking someone to invest, you will speak only 25% of the time and really listen during the rest of the conversation.
- Your belief in your organization will always exceed your fear of asking.
- You will always remember that if you don't have the time to express your gratitude, you don't have the time to have real people as donors.

1

More Thing



“I've learned that
people will forget what you said,
people will forget what you did,
but people will never forget
how you made them feel.”

— Maya Angelou

GRATITUDE

“Gratitude unlocks the fullness of life. It turns what we have into enough, and more. It turns denial into acceptance, chaos to order, confusion to clarity. It can turn a meal into a feast, a house into a home, a stranger into a friend. Gratitude makes sense of our past, brings peace for today, and creates a vision for tomorrow.”

— Melody Beattle

Book Suggestions

- ★ **Terry Axlerod:** The Joy of Fundraising
- ★ **Heather Mansfield:** Mobile for Good
- ★ **Beth Kanter:** Measuring the Networked Nonprofit
- ★ **Adam Braun:** The Promise of a Pencil
- ★ **Dan Palotta:** (TED Talk):
The Way We Think About Charity is Dead Wrong

Government Funding

- Someone needs to keep a vigilant eye on available federal, state, and local government grants.
- Formula and block grants that both states and local communities and school districts can receive and spend.
- Discretionary and project grants.

Government Funding

- Monitoring the Federal Register website – lists requests for proposals (RFP) and submission deadlines in many formats (e.g. print, web, PDF)
- State Agencies – website for grants
- Programs must have the capacity to track and respond to announcements. Grant must align with your mission.
- Nonprofits nationwide get 12% of their revenues from the government (Bray, 2015.)

Government Funding

■ GRANT CHALLENGES:

1. Often affected by political goals of current administration.
2. Short turn around time.
3. Requirements to attend annual trainings with other grantees
4. Intimidating reading of applications.
5. Complicated data collection and reporting systems.

Government Funding

- Never deviate from the application criteria.
- Pay close attention to every question and provide details.
- Many mentoring programs hire grant writers or ask a Board member to help with grant writing expertise.
- Submit a logic model that describes activities and outcomes.

What if your Grant is turned down?

- An outstanding proposal disqualified recently because it exceeded the length requirement ***by only one paragraph!***
- If you are rejected, do not forget to ask for a copy of your application with the reviewers' comments. Their suggestions and recommendations will help you second time around. Don't give up.

Second Webinar in the Series - May 11, 2016

- Corporate and Foundation giving and Engagement – 10 steps to success
- Matching gifts
- Planned giving
- Program events
- Direct Marketing
- Local Initiatives

References

- Weinberger, S.G. (2013) Program Funding. In D. L. DuBois & M.J. Karcher (Eds.), *Handbook of Youth Mentoring* (2nd Edition). Thousand Oaks, CA: Sage Publications
- Weinberger, S. (2005a). Direct corporate support. In M. Garringer (Ed.), *Sustainability planning and resource development of youth mentoring programs*. (pp. 41-49). Portland, OR: Education Northwest.